

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  Qualifying widow(er) (QW)  
 Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial SURESH	Last name THELU	<b>Your social security number</b> 788-87-8030
If joint return, spouse's first name and middle initial	Last name	<b>Spouse's social security number</b>

Home address (number and street). If you have a P.O. box, see instructions. 550 75TH ST		Apt. no. 205	<b>Presidential Election Campaign</b> Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input checked="" type="checkbox"/> You <input type="checkbox"/> Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. DOWNERS GROVE	State IL	ZIP code 60516	
Foreign country name	Foreign province/state/county	Foreign postal code	

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?  Yes  No

**Standard Deduction** **Someone can claim:**  You as a dependent  Your spouse as a dependent  Spouse itemizes on a separate return or you were a dual-status alien

**Age/Blindness** **You:**  Were born before January 2, 1956  Are blind **Spouse:**  Was born before January 2, 1956  Is blind

Dependents (see instructions): If more than four dependents, see instructions and check here ▶ <input type="checkbox"/>	(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see instructions): Child tax credit	Credit for other dependents
						<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Attach Sch. B if required.  <b>Standard Deduction for—</b> • Single or Married filing separately, \$12,400 • Married filing jointly or Qualifying widow(er), \$24,800 • Head of household, \$18,650 • If you checked any box under <i>Standard Deduction</i> , see instructions.	<b>1</b>	Wages, salaries, tips, etc. Attach Form(s) W-2 . . . . .		<b>1</b>	71,062.	
	<b>2a</b>	Tax-exempt interest . . . . .	<b>2a</b>	<b>b</b> Taxable interest . . . . .	<b>2b</b>	
	<b>3a</b>	Qualified dividends . . . . .	<b>3a</b>	<b>b</b> Ordinary dividends . . . . .	<b>3b</b>	
	<b>4a</b>	IRA distributions . . . . .	<b>4a</b>	<b>b</b> Taxable amount . . . . .	<b>4b</b>	
	<b>5a</b>	Pensions and annuities . . . . .	<b>5a</b>	<b>b</b> Taxable amount . . . . .	<b>5b</b>	
	<b>6a</b>	Social security benefits . . . . .	<b>6a</b>	<b>b</b> Taxable amount . . . . .	<b>6b</b>	
	<b>7</b>	Capital gain or (loss). Attach Schedule D if required. If not required, check here . . . . . ▶ <input type="checkbox"/>			<b>7</b>	
	<b>8</b>	Other income from Schedule 1, line 9 . . . . .			<b>8</b>	-6,030.
	<b>9</b>	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b> . . . . . ▶			<b>9</b>	65,032.
	<b>10</b>	Adjustments to income:				
	<b>a</b>	From Schedule 1, line 22 . . . . .	<b>10a</b>			
	<b>b</b>	Charitable contributions if you take the standard deduction. See instructions . . . . .	<b>10b</b>			
	<b>c</b>	Add lines 10a and 10b. These are your <b>total adjustments to income</b> . . . . . ▶			<b>10c</b>	
	<b>11</b>	Subtract line 10c from line 9. This is your <b>adjusted gross income</b> . . . . . ▶			<b>11</b>	65,032.
	<b>12</b>	<b>Standard deduction or itemized deductions</b> (from Schedule A) . . . . .			<b>12</b>	12,400.
<b>13</b>	Qualified business income deduction. Attach Form 8995 or Form 8995-A . . . . .			<b>13</b>		
<b>14</b>	Add lines 12 and 13 . . . . .			<b>14</b>	12,400.	
<b>15</b>	<b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0- . . . . .			<b>15</b>	52,632.	

16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/> _____	16	7,368.
17	Amount from Schedule 2, line 3	17	
18	Add lines 16 and 17	18	7,368.
19	Child tax credit or credit for other dependents	19	
20	Amount from Schedule 3, line 7	20	
21	Add lines 19 and 20	21	
22	Subtract line 21 from line 18. If zero or less, enter -0-	22	7,368.
23	Other taxes, including self-employment tax, from Schedule 2, line 10	23	0.
24	Add lines 22 and 23. This is your <b>total tax</b>	24	7,368.
25	Federal income tax withheld from:		
a	Form(s) W-2	25a	10,007.
b	Form(s) 1099	25b	
c	Other forms (see instructions)	25c	
d	Add lines 25a through 25c	25d	10,007.
26	2020 estimated tax payments and amount applied from 2019 return	26	
27	Earned income credit (EIC) No	27	
28	Additional child tax credit. Attach Schedule 8812	28	
29	American opportunity credit from Form 8863, line 8	29	
30	Recovery rebate credit. See instructions	30	1,800.
31	Amount from Schedule 3, line 13	31	
32	Add lines 27 through 31. These are your <b>total other payments and refundable credits</b>	32	1,800.
33	Add lines 25d, 26, and 32. These are your <b>total payments</b>	33	11,807.

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you <b>overpaid</b>	34	4,439.
35a	Amount of line 34 you want <b>refunded to you</b> . If Form 8888 is attached, check here <input type="checkbox"/>	35a	4,439.
b	Routing number 021200339	c Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings	
d	Account number 381042201120		
36	Amount of line 34 you want <b>applied to your 2021 estimated tax</b>	36	

Amount You Owe

37	Subtract line 33 from line 24. This is the <b>amount you owe now</b>	37	
<b>Note:</b> Schedule H and Schedule SE filers, line 37 may not represent all of the taxes you owe for 2020. See Schedule 3, line 12e, and its instructions for details.			
38	Estimated tax penalty (see instructions)	38	

Third Party Designee

Do you want to allow another person to discuss this return with the IRS? See instructions  Yes. Complete below.  No

Designee's name \_\_\_\_\_ Phone no. \_\_\_\_\_ Personal identification number (PIN) \_\_\_\_\_

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation SOFTWARE ENGINEER	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
Phone no.	Email address		

Paid Preparer Use Only

Preparer's name SYAM PRIYA RAM SAGAR GUPTA TALLAM	Preparer's signature SYAM PRIYA RAM SAGAR GUPTA TALLAM	Date 02/09/2021	PTIN P02082703	Check if: <input type="checkbox"/> Self-employed
Firm's name GLOBAL TAXES LLC	Firm's address 2530 Pebble Creek Ln Cumming GA 30041			Phone no. (678) 965-9522
				Firm's EIN 30-1017196

**SCHEDULE 1  
(Form 1040)**

Department of the Treasury  
Internal Revenue Service

**Additional Income and Adjustments to Income**

▶ **Attach to Form 1040, 1040-SR, or 1040-NR.**  
▶ **Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.**

OMB No. 1545-0074

**2020**  
Attachment  
Sequence No. **01**

Name(s) shown on Form 1040, 1040-SR, or 1040-NR  
SURESH THELU

Your social security number  
788-87-8030

**Part I Additional Income**

<b>1</b>	Taxable refunds, credits, or offsets of state and local income taxes . . . . .	<b>1</b>	
<b>2a</b>	Alimony received . . . . .	<b>2a</b>	
<b>b</b>	Date of original divorce or separation agreement (see instructions) ▶		
<b>3</b>	Business income or (loss). Attach Schedule C . . . . .	<b>3</b>	
<b>4</b>	Other gains or (losses). Attach Form 4797 . . . . .	<b>4</b>	
<b>5</b>	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	<b>5</b>	-6,030.
<b>6</b>	Farm income or (loss). Attach Schedule F . . . . .	<b>6</b>	
<b>7</b>	Unemployment compensation . . . . .	<b>7</b>	
<b>8</b>	Other income. List type and amount ▶	<b>8</b>	
<b>9</b>	Combine lines 1 through 8. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 8 . . . . .	<b>9</b>	-6,030.

**Part II Adjustments to Income**

<b>10</b>	Educator expenses . . . . .	<b>10</b>	
<b>11</b>	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 . . . . .	<b>11</b>	
<b>12</b>	Health savings account deduction. Attach Form 8889 . . . . .	<b>12</b>	
<b>13</b>	Moving expenses for members of the Armed Forces. Attach Form 3903 . . . . .	<b>13</b>	
<b>14</b>	Deductible part of self-employment tax. Attach Schedule SE . . . . .	<b>14</b>	
<b>15</b>	Self-employed SEP, SIMPLE, and qualified plans . . . . .	<b>15</b>	
<b>16</b>	Self-employed health insurance deduction . . . . .	<b>16</b>	
<b>17</b>	Penalty on early withdrawal of savings . . . . .	<b>17</b>	
<b>18a</b>	Alimony paid . . . . .	<b>18a</b>	
<b>b</b>	Recipient's SSN . . . . . ▶		
<b>c</b>	Date of original divorce or separation agreement (see instructions) ▶		
<b>19</b>	IRA deduction . . . . .	<b>19</b>	
<b>20</b>	Student loan interest deduction . . . . .	<b>20</b>	
<b>21</b>	Tuition and fees deduction. Attach Form 8917 . . . . .	<b>21</b>	
<b>22</b>	Add lines 10 through 21. These are your <b>adjustments to income</b> . Enter here and on Form 1040, 1040-SR, or 1040-NR, line 10a . . . . .	<b>22</b>	

**SCHEDULE E**  
**(Form 1040)**

**Supplemental Income and Loss**

(From rental real estate, royalties, partnerships, S corporations, estates, trusts, REMICs, etc.)

OMB No. 1545-0074

**2020**

Attachment  
Sequence No. **13**

Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040, 1040-SR, 1040-NR, or 1041.

▶ Go to [www.irs.gov/ScheduleE](http://www.irs.gov/ScheduleE) for instructions and the latest information.

Name(s) shown on return

Your social security number

SURESH THELU

788-87-8030

**Part I Income or Loss From Rental Real Estate and Royalties** Note: If you are in the business of renting personal property, use **Schedule C**. See instructions. If you are an individual, report farm rental income or loss from **Form 4835** on page 2, line 40.

**A** Did you make any payments in 2020 that would require you to file Form(s) 1099? See instructions . . . . .  Yes  No

**B** If "Yes," did you or will you file required Form(s) 1099? . . . . .  Yes  No

<b>1a</b>	Physical address of each property (street, city, state, ZIP code)				
<b>A</b>	1-15/A PEMBATLA, SARANGPUR JAGTIAL TELANGANA IN 50529				
<b>B</b>					
<b>C</b>					
<b>1b</b>	Type of Property (from list below)	<b>2</b> For each rental real estate property listed above, report the number of fair rental and personal use days. Check the <b>QJV</b> box only if you meet the requirements to file as a qualified joint venture. See instructions.	Fair Rental Days	Personal Use Days	QJV
<b>A</b>	3		365	0	<input type="checkbox"/>
<b>B</b>					<input type="checkbox"/>
<b>C</b>					<input type="checkbox"/>

**Type of Property:**

- 1 Single Family Residence      3 Vacation/Short-Term Rental      5 Land      7 Self-Rental
- 2 Multi-Family Residence      4 Commercial      6 Royalties      8 Other (describe)

Income:		Properties:	A	B	C
<b>3</b>	Rents received . . . . .	<b>3</b>	520.		
<b>4</b>	Royalties received . . . . .	<b>4</b>			

**Expenses:**

<b>5</b>	Advertising . . . . .	<b>5</b>	100.		
<b>6</b>	Auto and travel (see instructions) . . . . .	<b>6</b>	150.		
<b>7</b>	Cleaning and maintenance . . . . .	<b>7</b>	250.		
<b>8</b>	Commissions. . . . .	<b>8</b>			
<b>9</b>	Insurance . . . . .	<b>9</b>			
<b>10</b>	Legal and other professional fees . . . . .	<b>10</b>			
<b>11</b>	Management fees . . . . .	<b>11</b>			
<b>12</b>	Mortgage interest paid to banks, etc. (see instructions) . . . . .	<b>12</b>			
<b>13</b>	Other interest. . . . .	<b>13</b>	5,800.		
<b>14</b>	Repairs. . . . .	<b>14</b>	250.		
<b>15</b>	Supplies . . . . .	<b>15</b>			
<b>16</b>	Taxes . . . . .	<b>16</b>			
<b>17</b>	Utilities . . . . .	<b>17</b>			
<b>18</b>	Depreciation expense or depletion . . . . .	<b>18</b>			
<b>19</b>	Other (list) ▶ . . . . .	<b>19</b>			
<b>20</b>	Total expenses. Add lines 5 through 19 . . . . .	<b>20</b>	6,550.		

**21** Subtract line 20 from line 3 (rents) and/or 4 (royalties). If result is a (loss), see instructions to find out if you must file **Form 6198** . . . . . **21** -6,030.

**22** Deductible rental real estate loss after limitation, if any, on **Form 8582** (see instructions) . . . . . **22** ( -6,030. ) ( ) ( )

<b>23a</b>	Total of all amounts reported on line 3 for all rental properties . . . . .	<b>23a</b>	520.	
<b>b</b>	Total of all amounts reported on line 4 for all royalty properties . . . . .	<b>23b</b>		
<b>c</b>	Total of all amounts reported on line 12 for all properties . . . . .	<b>23c</b>		
<b>d</b>	Total of all amounts reported on line 18 for all properties . . . . .	<b>23d</b>		
<b>e</b>	Total of all amounts reported on line 20 for all properties . . . . .	<b>23e</b>	6,550.	

**24** **Income.** Add positive amounts shown on line 21. **Do not** include any losses . . . . . **24**

**25** **Losses.** Add royalty losses from line 21 and rental real estate losses from line 22. Enter total losses here . . . . . **25** ( 6,030. )

**26** **Total rental real estate and royalty income or (loss).** Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Schedule 1 (Form 1040), line 5. Otherwise, include this amount in the total on line 41 on page 2 . . . . . **26** -6,030.

For Paperwork Reduction Act Notice, see the separate instructions.

Schedule E (Form 1040) 2020

# Tax History Report

▶ Keep for your records

**2020**

Name(s) Shown on Return

SURESH THELU

Five Year Tax History:					
	2016	2017	2018	2019	2020
Filing status . . . . .					Single
Total income . . . . .					65,032.
Adjustments to income					
Adjusted gross income					65,032.
Tax expense . . . . .					3,518.
Interest expense . . .					
Contributions . . . . .					
Misc. deductions . . .					
Other itemized ded'ns					
Total itemized/ standard deduction . .					12,400.
Exemption amount . .					0.
QBI deduction . . . . .					
Taxable income . . . .					52,632.
Tax . . . . .					7,368.
Alternative min tax . .					
Total credits . . . . .					
Other taxes . . . . .					
Payments . . . . .					11,807.
Form 2210 penalty . .					
Amount owed . . . . .					
Applied to next year's estimated tax . .					
Refund . . . . .					4,439.
Effective tax rate % . .					11.33
**Tax bracket % . . . .					22.0

\*\*Tax bracket % is based on Taxable income.

IRS e-file Authentication Statement

2020

Keep for your records

Table with 2 columns: Name(s) Shown on Return (SURESH THELU) and Social Security Number (788-87-8030)

A - Practitioner PIN Authorization

Note - PIN information is entered in Part VI of the Federal Information Worksheet. This worksheet only serves as a record of the PIN information transmitted in the electronic return.

QuickZoom to the Federal Information Worksheet to enter PIN information

Form with checkboxes for Taxpayer(s) entered PIN(s), ERO entered Primary Taxpayer's PIN (checked), ERO entered Secondary Taxpayer's PIN, and ERO entered PIN(s) on behalf of taxpayer(s).

B - Signature of Electronic Return Originator

ERO Declaration:

I declare that the information contained in this electronic tax return is the information furnished to me by the taxpayer. If the taxpayer furnished me a completed tax return, I declare that the information contained in this electronic tax return is identical to that contained in the return provided by the taxpayer.

I am signing this Tax Return by entering my PIN below.

ERO's PIN (EFIN followed by any 5 numbers) . . . . . EFIN 587278 Self-Select PIN 61989

C - Signature of Taxpayer/Spouse

Perjury Statement:

Under penalties of perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

Consent to Disclosure:

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return to IRS and to receive the following information from IRS: (1) acknowledgment of receipt or reason for rejection of transmission; (2) refund offset; (3) reason for any delay in processing or refund; and, (4) date of any refund.

I am signing this Tax Return and Electronic Funds Withdrawal Consent, if applicable, with my Self-Select PIN below.

Form with fields for Taxpayer's PIN (5 numbers) 78030, Spouse's PIN (5 numbers), and Date 02/03/2021.

D - Form 1310 Signature and Verification

Completion of this section indicates that I am requesting a refund of taxes overpaid by or on behalf of the decedent. Under penalties of perjury, I declare that I have examined this Form 1310 claim, and to the best of my knowledge and belief, it is true, correct, and complete.

Signature of person claiming refund (35 character limit) and Date

Part I – Personal Information

**Taxpayer:**  
 Last name . . . . . THELU  
 First name . . . . . SURESH  
 Middle initial . . . . . Suffix . . . . .  
 Social security no. . . . . 788-87-8030  
 Occupation . . . . . SOFTWARE ENGINEER  
 Date of birth . . . . . 06/10/1992 (mm/dd/yyyy)  
 Age as of 1-1-2021 . . . . . 28  
 Date of death . . . . .  
 Legally blind . . . . .  
 E-mail address . . . . . SURESHTHELU26@GMAIL.COM  
 Work phone . . . . . (951) 237-1034 Ext  
 Cell phone . . . . . (951) 237-1034  
 Home phone . . . . . (951) 237-1034  
 Fax number . . . . .

**Spouse:**  
 Last name (if different) . . . . .  
 First name . . . . .  
 Middle initial . . . . . Suffix . . . . .  
 Social security no. . . . .  
 Occupation . . . . .  
 Date of birth . . . . . (mm/dd/yyyy)  
 Age as of 1-1-2021 . . . . .  
 Date of death . . . . .  
 Legally blind . . . . .  
 E-mail address . . . . .  
 Work phone . . . . . Ext  
 Cell phone . . . . .  
**Note:** Work phone is transmitted for electronic funds withdrawal.

Best contact phone number . . . . . Taxpayer work phone (951) 237-1034  
 Print phone number on Form 1040 . . .  Home  Taxpayer work  Spouse work  
 Print Form 1040-SR instead of Form 1040 . . . . .  Yes  No

**US Address:**  
 Address . . . . . 550 75TH ST Apt no. . . . . 205  
 City . . . . . DOWNERS GROVE State . . . . . IL ZIP code . . . . . 60516  
**Foreign Address:** Check this box to use foreign address . .   
 Address . . . . . Apt no. . . . .  
 City . . . . .  
 Foreign code . . . . . Foreign country . . . . .  
 Foreign province/country . . . . . Foreign postal code . . . . .  
 Foreign phone . . . . .  
 APO/FPO/DPO address . .  APO  FPO  DPO

Part II – Federal Filing Status

1 Single  
 2 Married filing jointly  
 3 Married filing separately  
 Taxpayer did **not** live with spouse at any time during year  
 Taxpayer eligible to claim spouse's exemption (state use), blind, or over age 65 (see Help)  
 4 Head of household  
 If qualifying person is child but not dependent:  
 Child's First name MI Last Name Suff  
 Child's social security number . . . . .  
 5 Qualifying widow(er)  
 Year spouse died  2018  2019  
 Enter the qualifying person's name:  
 Child's First name MI Last Name Suff  
 Child's social security number . . . . .

Part III – Dependent/Earned Income Credit/Child and Dependent Care Credit Information

First name Last name	MI Suff	Social security number *Relationship	Date of birth (mm/dd/yyyy)  Date of death (mm/dd/yyyy)**	A G E  E I C	Dependent Identity Protection PIN (see tax help)		Qualified child/dep care exps incurred and paid 2020  Code	Not qual credit other dep.  Not qual for child tax credit Or non U.S.***
					Lived with taxpyr in U.S.	Educ Tuition and Fees		

\* **Caution:** If claiming child other than taxpayer's see **Relationship** in Help  
 \*\* The health care shared responsibility payment calculation does not include individuals after date of death  
 \*\*\* **Caution:** If this person is NOT a U.S. citizen, U.S. national, or a U.S. resident check this box

# Identity Verification Worksheet

2020

▶ See tax help for more information on identity verification

Name(s) Shown on Return  
SURESH THELU

Social Security Number  
788-87-8030

### Driver's License or State Id Information

Required for electronic filing, either complete the driver's license or state id detail information below or select the appropriate box for taxpayer and spouse to indicate why driver's license or state id information is not present.

**Note:** Providing identification numbers helps the IRS and states verify taxpayer identity which can prevent unnecessary delays in tax return processing.

**All identity verification information should be entered here and will automatically flow to the state return.**

### Taxpayer/Spouse does not have a driver's license or state id

Taxpayer  
 Spouse

**Note:** Alabama does not allow this option

### Taxpayer/Spouse did not provide driver's license or state id information

Taxpayer  
 Spouse

**Note:** Alabama, New York and Ohio do not allow this option

Check to confirm transferred driver's license or state id information (which appears in green) is correct . . . . .

**Note:** Transfer not available for returns with Alabama, Iowa, or New York state taxes. See tax help for more information.

### Driver's License Detail

#### Taxpayer:

Issuing state . . . . . \_\_\_\_\_  
License number . . . . . \_\_\_\_\_  
Issue date . . . . . \_\_\_\_\_  
Expiration date . . . . . \_\_\_\_\_  
Does not expire . . . . .   
NY Document number (first 3 chars)\* . . . . . \_\_\_\_\_

#### Spouse:

Issuing state . . . . . \_\_\_\_\_  
License number . . . . . \_\_\_\_\_  
Issue date . . . . . \_\_\_\_\_  
Expiration date . . . . . \_\_\_\_\_  
Does not expire . . . . .   
NY Document number (first 3 chars)\* . . . . . \_\_\_\_\_

### State Identification Card Detail

#### Taxpayer:

Issuing state . . . . . \_\_\_\_\_  
Identification number . . . . . \_\_\_\_\_  
Issue date . . . . . \_\_\_\_\_  
Expiration date . . . . . \_\_\_\_\_  
Does not expire . . . . .   
NY Document number (first 3 chars)\* . . . . . \_\_\_\_\_

#### Spouse:

Issuing state . . . . . \_\_\_\_\_  
Identification number . . . . . \_\_\_\_\_  
Issue date . . . . . \_\_\_\_\_  
Expiration date . . . . . \_\_\_\_\_  
Does not expire . . . . .   
NY Document number (first 3 chars)\* . . . . . \_\_\_\_\_

\* Enter the first 3 characters of the NY document number, which is the 8 or 10 number/letter combination found at the bottom of the NY license (or NY state ID) or on the back if it was issued after January 28, 2014.

### Additional Verification Information

Use these fields to record the client status and method used to verify the taxpayer and spouse identity.



**Identity Verification Method** (select one):

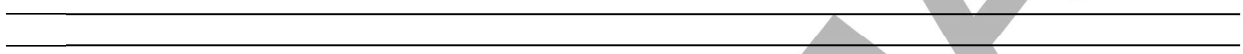
- In person
- Remote via email, phone, or fax
- Both in person and remote
- Identity not verified

**Documents Used to Verify Primary Taxpayer Identity:**

- Driver's license (complete detail above)
- State issued identification card (complete detail above)
- Passport
- Account statement from financial institution
- Utility billing statement
- Credit card billing statement

**Documents Used to Verify Spouse Identity** (If you file joint return):

- Driver's license (complete detail above)
- State issued identification card (complete detail above)



DO NOT MAIL

Electronic Filing Information Worksheet

2020

Keep for your records

Name(s) Shown on Return
SURESH THELU

Social Security Number
788-87-8030

Payment by Check (Form 1040-V) - Federal Balance Due

Date Form 1040-V was given to client

Electronic Return Originator Information

The ERO Information below will automatically calculate based on the preparer code entered on the Federal Information Worksheet.

Calculates to the EFIN for the ERO that is responsible for filing this return based on the preparer code. For returns that are marked as a "Non-Paid Preparer" (XNP) or "Self-Prepared" (XSP) can be changed but is required.
587278
For returns that are marked as a "Non-Paid Preparer" (XNP) or "Self-Prepared" (XSP) enter a PIN for the ERO that is responsible for filing return

ERO Name: GLOBAL TAXES LLC
ERO Address: 2530 Pebble Creek Ln
City: Cumming, State: GA, ZIP Code: 30041
Country:
ERO Electronic Filers Identification Number (EFIN): 587278
ERO Employer Identification Number: 30-1017196
ERO Social Security Number or PTIN:

Paid Preparer Information

Firm Name: GLOBAL TAXES LLC
Name: SYAM PRIYA RAM SAGAR GUPTA TALLAM
Address: 2530 Pebble Creek Ln
City: Cumming, State: GA, ZIP Code: 30041
Country:
Social Security Number or PTIN: P02082703
Employer Identification Number: 30-1017196
Phone Number: (678) 965-9522
Fax Number:
E-mail Address: SYAM@GTAXFILE.COM

Non Paid Preparer Information

If the return was prepared or reviewed through an IRS tax assistance program, self-prepared by the taxpayer, or was prepared by another person who was not paid to prepare the return, check one of the following boxes that applies to this return.

IRS-reviewed
IRS-prepared
Prepared by taxpayer or other non-paid preparer

Amended Returns

- Check this box to file another federal amended return electronically
File another Amended Form 114 Report of Foreign Bank and Financial Accounts (FBAR) electronically
Check this box to file another state and/or city amended return electronically

\* Select the state and/or city amended return(s) to file electronically.

Table with columns for State/City and checkboxes. Rows include Georgia, Michigan, New York, Vermont, and Wisconsin.

**Miscellaneous Electronic Filing Items**

If the return was rejected for dependent name and SSN mismatch (business rule R0000-504-01) or Schedule EIC qualifying child name and SSN mismatch (business rule SEIC-F1040-501-01), check this box to retransmit this return as an imperfect return. . . . .

Enter an 'in care of addressee' if applicable . . . . .

Name of personal representative for deceased returns . . .

If married filing joint and one spouse is deceased, is the surviving spouse also the personal representative? . . . . .  Yes  No

Check this box if your client is in the U.S. Armed Forces with a stateside address . . . . .

Select the appropriate combat zone from the picklist if the taxpayer (or spouse) last served in an area designated as a combat zone or qualified hazardous duty area. . . . .

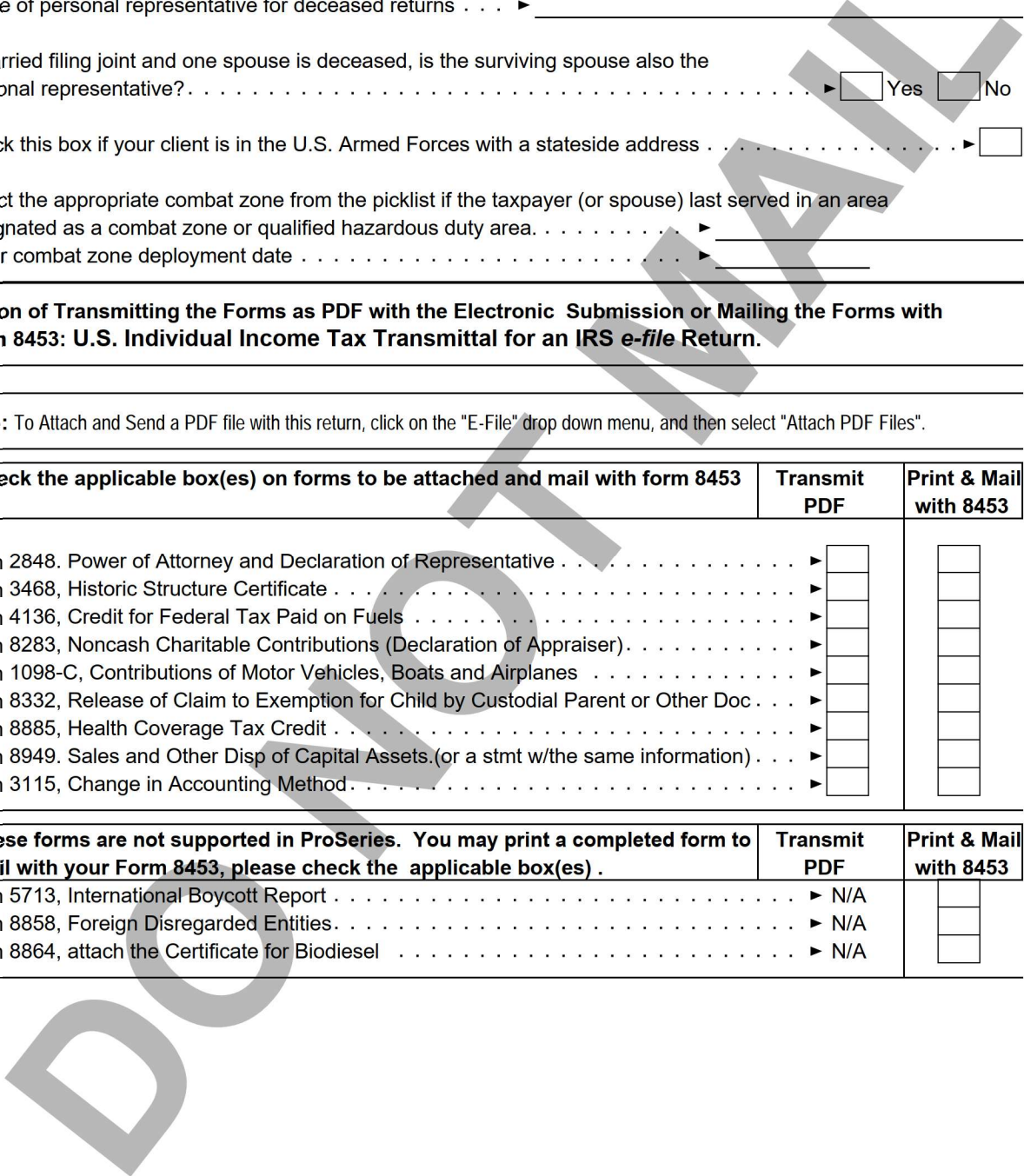
Other combat zone deployment date . . . . .

**Option of Transmitting the Forms as PDF with the Electronic Submission or Mailing the Forms with Form 8453: U.S. Individual Income Tax Transmittal for an IRS e-file Return.**

**Note:** To Attach and Send a PDF file with this return, click on the "E-File" drop down menu, and then select "Attach PDF Files".

Check the applicable box(es) on forms to be attached and mail with form 8453	Transmit PDF	Print & Mail with 8453
Form 2848, Power of Attorney and Declaration of Representative . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 3468, Historic Structure Certificate . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 4136, Credit for Federal Tax Paid on Fuels . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 8283, Noncash Charitable Contributions (Declaration of Appraiser). . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 1098-C, Contributions of Motor Vehicles, Boats and Airplanes . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 8332, Release of Claim to Exemption for Child by Custodial Parent or Other Doc. . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 8885, Health Coverage Tax Credit . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 8949, Sales and Other Disp of Capital Assets.(or a stmt w/the same information) . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
Form 3115, Change in Accounting Method. . . . .	<input type="checkbox"/>	<input type="checkbox"/>

These forms are not supported in ProSeries. You may print a completed form to mail with your Form 8453, please check the applicable box(es) .	Transmit PDF	Print & Mail with 8453
Form 5713, International Boycott Report . . . . .	N/A	<input type="checkbox"/>
Form 8858, Foreign Disregarded Entities. . . . .	N/A	<input type="checkbox"/>
Form 8864, attach the Certificate for Biodiesel . . . . .	N/A	<input type="checkbox"/>



► Keep for your records

Name(s) Shown on Return SURESH THELU	Social Security Number 788-87-8030
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Form W-2 Employer	SP	Wages	Federal Tax	State Wages	State Tax
COMTEK GLOBAL INC		11,314.	1,333.	11,314.	560.
BEEJAUM TECHNOLOGY GROUP, INC		59,748.	8,674.	59,748.	2,958.
<b>Totals</b>		71,062.	10,007.	71,062.	3,518.

**Form W-2 Summary**

Box No.	Description	Taxpayer	Spouse	Total
1	Total wages, tips and compensation:			
	Non-statutory & statutory wages not on Sch C . . .	71,062.		71,062.
	Statutory wages reported on Schedule C . . . . .			
	Foreign wages included in total wages . . . . .			
	Unreported tips . . . . .	0.		0.
2	Total federal tax withheld . . . . .	10,007.		10,007.
3 & 7	Total social security wages/tips . . . . .	24,052.		24,052.
4	Total social security tax withheld . . . . .	1,491.		1,491.
5	Total Medicare wages and tips . . . . .	24,052.		24,052.
6	Total Medicare tax withheld . . . . .	349.		349.
8	Total allocated tips . . . . .			
9	Not used . . . . .			
10 a	Total dependent care benefits . . . . .			
b	Offsite dependent care benefits . . . . .			
c	Onsite dependent care benefits . . . . .			
11	Total distributions from nonqualified plans . . . . .			
12 a	Total from Box 12 . . . . .			
b	Elective deferrals to qualified plans . . . . .			
c	Roth contrib. to 401(k), 403(b), 457(b) plans . . . . .			
d	Deferrals to government 457 plans . . . . .			
e	Deferrals to non-government 457 plans . . . . .			
f	Deferrals 409A nonqual deferred comp plan . . . . .			
g	Income 409A nonqual deferred comp plan . . . . .			
h	Uncollected Medicare tax . . . . .			
i	Uncollected social security and RRTA tier 1 . . . . .			
j	Uncollected RRTA tier 2 . . . . .			
k	Income from nonstatutory stock options . . . . .			
l	Non-taxable combat pay . . . . .			
m	QSEHRA benefits . . . . .			
n	Total other items from box 12 . . . . .			
14 a	Total deductible mandatory state tax . . . . .			
b	Total deductible charitable contributions . . . . .			
c	Total state deductible employee expenses . . . . .			
d	Total RR Compensation . . . . .			
e	Total RR Tier 1 tax . . . . .			
f	Total RR Tier 2 tax . . . . .			
g	Total RR Medicare tax . . . . .			
h	Total RR Additional Medicare tax . . . . .			
i	Total RRTA tips . . . . .			
j	Total other items from box 14 . . . . .			
k	Total sick leave subject to \$511 limit . . . . .			
l	Total sick leave subject to \$200 limit . . . . .			
m	Total emergency family leave wages . . . . .			
16	Total state wages and tips . . . . .	71,062.		71,062.
17	Total state tax withheld . . . . .	3,518.		3,518.
19	Total local tax withheld . . . . .			

Name as shown on return SURESH THELU	Social Security Number 788-87-8030
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Employer EIN . . . . . 20-3584299  
 Employer Name . . . . . COMTEK GLOBAL INC  
 Name (continued) . . . . .  
 Street Address or P. O. Box 242 OLD NEW BRUNSWICK ROAD SUITE 457  
 City PISCATAWAY State NJ ZIP 08854  
 Foreign Province/County . . . . .  
 Foreign Postal Code . . . . .  
 Foreign Country . . . . .

Spouse's W-2  Do not transfer this W-2 to next year  
 Automatically calculate lines 3 through 6 and line 16.  
**Caution:** Box 12 entries for deferred compensation will change lines 3 through 6 automatically.

1 Wages, tips, other comp . . . . . 11,314.	2 Federal income tax withheld . . . . . 1,333.
3 Social security wages . . . . .	4 Social sec tax withheld . . . . .
5 Medicare wages and tips . . . . .	6 Medicare tax withheld . . . . .
7 Social security tips . . . . .	8 Allocated tips . . . . .

13 b  Retirement plan  
 Foreign source income eligible for exclusion on Form 2555  
 Active duty military pay

Box 12 Code	Box 12 Amount	If Box 12 code is:
		A: Enter amount attributable to RRTA Tier 2 tax . . . . .
		M: Enter amount attributable to RRTA Tier 2 tax . . . . .
		P: Double-click to link to Form 3903, line 4 . . . . .
		R: Enter MSA contribution for Taxpayer . . . . .
		Spouse . . . . .
		W: Enter HSA contribution for Taxpayer . . . . .
		Spouse . . . . .
		G: <input type="checkbox"/> Employer is not a state or local government

State	Box 15 Employer's state I.D. no.	Box 16 State wages, tips, etc.	Box 17 State income tax
IL	20-3584299 000	11,314.	560.

I confirm that the state withholding identification number(s) are accurate . . . . .

Box 20 Locality name	Box 18 Local wages, tips, etc.	Box 19 Local income tax	Associated State

9 Dependent care benefits (Check if employer furnished care at work) . . . ▶ <input type="checkbox"/>	9	
10 Dependent care benefits — Amount forfeited from flexible spending account . . .	10	
11 Distributions from Section 457 and other nonqualified plans (See help, if EIC, Child Care, Child Tax Credit, or IRAs.) . . . . .	11	

Box 14 Description or Code on Actual Form W-2	Amount	ProSeries Identification of Description or Code (Identify this item by selecting the identification from the drop down list. If not on the list, select Other).

Keep for your records

SURESH THELU	788-87-8030	Page 2
Employer Name . . . . . COMTEK GLOBAL INC		

Part I – Statutory employees

A <input type="checkbox"/> Box 13a. Statutory employee	
B <input type="checkbox"/> Deducting expenses in connection with this income	
C <input type="checkbox"/> If deducting expenses, double-click to link to Schedule C . . . . .	C

Part II – Clergy, church employees, members of recognized religious sects

Clergy only:

D Enter your designated housing or parsonage allowance . . . . .	D
E Enter the smallest of (a) your designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value . . . . .	E
F If no FICA was withheld, check the applicable box below	
1 <input type="checkbox"/> Pay self-employment tax on housing or parsonage allowance only	
2 <input type="checkbox"/> Pay self-employment tax on W-2 income only	
3 <input type="checkbox"/> Pay self-employment tax on W-2 income and housing allowance	
4 <input type="checkbox"/> Exempt from SE tax and have an approved exemption Form 4361	

Non-Clergy:

G If no FICA was withheld, check the applicable box below	
1 <input type="checkbox"/> Pay self-employment tax on this W-2 income	
2 <input type="checkbox"/> Exempt from self-employment tax and have an approved Form 4029	

Part III – Unreported Tip Income

H 1 Tips \$20 or more in a month which were not reported to employer . . . . .	H1
2 Tips less than \$20 in a month which were not required to be reported . . . . .	H2
3 Value of non-cash tips, such as tickets or passes, not reported to employer . . . . .	H3
4 Actual amount of allocated tips if different than the amount in box 8 . . . . .	H4
5 Tips paid out through a tip-sharing arrangement . . . . .	H5
6 <input type="checkbox"/> Employer is a federal, state, or local government and tips are only subject to Medicare tax	

Part IV – Substitute Form W-2

a If substitute Form W-2 needed, double-click to link this W-2 to a Form 4852 . . . . . ▶

b Enter Form 4852, Line 9 information. "How did you determine amounts on line 7 of Form 4852?"

\_\_\_\_\_

\_\_\_\_\_

c Form 4852, Line 10 information. "Explain your efforts to obtain Form W-2?"

\_\_\_\_\_

\_\_\_\_\_

d QuickZoom to completed Form 4852 for reference . . . . . ▶

Part V – Inmate in a Penal Institution

J a Pay from work performed while an inmate in a penal institution . . . . .

Part VI – Additional Information for Electronic Filing and Certain States (See Help)

13 c  Third-party sick pay

Non-standard W-2 (handwritten, typewritten, or altered in any way)

Corrected W-2

Income from Paid Family Leave

Control number (optional) . . . . .

Employee information: Correct to match employee information on W-2

Employee's SSN. . . . . 788-87-8030

First name M.I. Last name Suff.

SURESH THELU

Address City St ZIP code

550 75TH ST, Apt. 205 DOWNERS GROVE IL 60516

Foreign Province/County Foreign Postal Code

Foreign Country

► Keep for your records

Name as shown on return SURESH THELU	Social Security Number 788-87-8030
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Employer EIN . . . . . 83-3568950  
 Employer Name . . . . . BEEJAUM TECHNOLOGY GROUP, INC  
 Name (continued) . . . . .  
 Street Address or P. O. Box 100 OVERLOOK CTR  
 City . PRINCETON State NJ ZIP . 08540  
 Foreign Province/County . . . . .  
 Foreign Postal Code . . . . .  
 Foreign Country . . . . .

Spouse's W-2  Do not transfer this W-2 to next year  
 Automatically calculate lines 3 through 6 and line 16.  
**Caution:** Box 12 entries for deferred compensation will change lines 3 through 6 automatically.

1	Wages, tips, other comp . . . . .	59,748.	2	Federal income tax withheld . . . . .	8,674.
3	Social security wages . . . . .	24,052.	4	Social sec tax withheld . . . . .	1,491.
5	Medicare wages and tips . . . . .	24,052.	6	Medicare tax withheld . . . . .	349.
7	Social security tips . . . . .		8	Allocated tips . . . . .	

- 13 b  Retirement plan  
 Foreign source income eligible for exclusion on Form 2555  
 Active duty military pay

Box 12 Code	Box 12 Amount	If Box 12 code is:
—	—	A: Enter amount attributable to RRTA Tier 2 tax . . . . .
—	—	M: Enter amount attributable to RRTA Tier 2 tax . . . . .
—	—	P: Double-click to link to Form 3903, line 4 . . . . .
—	—	R: Enter MSA contribution for Taxpayer . . . . .
—	—	Spouse . . . . .
—	—	W: Enter HSA contribution for Taxpayer . . . . .
—	—	Spouse . . . . .
—	—	G: <input type="checkbox"/> Employer is not a state or local government

State	Box 15 Employer's state I.D. no.	Box 16 State wages, tips, etc.	Box 17 State income tax
IL	83-3568950000	59,748.	2,958.
—	—	—	—
—	—	—	—

I confirm that the state withholding identification number(s) are accurate . . . . .

Box 20 Locality name	Box 18 Local wages, tips, etc.	Box 19 Local income tax	Associated State
—	—	—	—
—	—	—	—
—	—	—	—

9	Dependent care benefits (Check if employer furnished care at work) . . . . . <input type="checkbox"/>	9	
10	Dependent care benefits — Amount forfeited from flexible spending account . . . . .	10	
11	Distributions from Section 457 and other nonqualified plans (See help, if EIC, Child Care, Child Tax Credit, or IRAs.) . . . . .	11	

Box 14 Description or Code on Actual Form W-2	Amount	ProSeries Identification of Description or Code (Identify this item by selecting the identification from the drop down list. If not on the list, select Other).
—	—	—
—	—	—
—	—	—

Keep for your records

SURESH THELU	788-87-8030	Page 2
<b>Employer Name . . . . .</b> BEEJAUM TECHNOLOGY GROUP, INC		

**Part I – Statutory employees**

<b>A</b> <input type="checkbox"/> Box 13a. Statutory employee <b>B</b> <input type="checkbox"/> Deducting expenses in connection with this income <b>C</b> <i>If deducting expenses, double-click to link to Schedule C . . . . .</i>	<b>C</b>	
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**Part II – Clergy, church employees, members of recognized religious sects**

<b>Clergy only:</b>		
<b>D</b> Enter your designated housing or parsonage allowance . . . . .	<b>D</b>	
<b>E</b> Enter the smallest of (a) your designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value . . . . .	<b>E</b>	
<b>F</b> <b>If no FICA was withheld, check the applicable box below</b>		
1 <input type="checkbox"/> Pay self-employment tax on housing or parsonage allowance only		
2 <input type="checkbox"/> Pay self-employment tax on W-2 income only		
3 <input type="checkbox"/> Pay self-employment tax on W-2 income and housing allowance		
4 <input type="checkbox"/> Exempt from SE tax and have an approved exemption Form 4361		
<b>Non-Clergy:</b>		
<b>G</b> <b>If no FICA was withheld, check the applicable box below</b>		
1 <input type="checkbox"/> Pay self-employment tax on this W-2 income		
2 <input type="checkbox"/> Exempt from self-employment tax and have an approved Form 4029		

**Part III – Unreported Tip Income**

<b>H 1</b> Tips \$20 or more in a month which were not reported to employer . . . . .	<b>H1</b>	
<b>2</b> Tips less than \$20 in a month which were not required to be reported . . . . .	<b>H2</b>	
<b>3</b> Value of non-cash tips, such as tickets or passes, not reported to employer . . . . .	<b>H3</b>	
<b>4</b> Actual amount of allocated tips if different than the amount in box 8 . . . . .	<b>H4</b>	
<b>5</b> Tips paid out through a tip-sharing arrangement . . . . .	<b>H5</b>	
<b>6</b> <input type="checkbox"/> Employer is a federal, state, or local government and tips are only subject to Medicare tax		

**Part IV – Substitute Form W-2**

<b>a</b> If substitute Form W-2 needed, double-click to link this W-2 to a Form 4852 . . . . . ▶	
<b>b</b> Enter Form 4852, Line 9 information. "How did you determine amounts on line 7 of Form 4852?"	
<b>c</b> Form 4852, Line 10 information. "Explain your efforts to obtain Form W-2?"	
<b>d</b> <b>QuickZoom</b> to completed Form 4852 for reference . . . . . ▶	

**Part V – Inmate in a Penal Institution**

<b>J a</b> Pay from work performed while an inmate in a penal institution . . . . .	<input type="checkbox"/>
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**Part VI – Additional Information for Electronic Filing and Certain States (See Help)**

<b>13 c</b> <input type="checkbox"/> Third-party sick pay <input type="checkbox"/> Non-standard W-2 (handwritten, typewritten, or altered in any way) <input type="checkbox"/> Corrected W-2 <input type="checkbox"/> Income from Paid Family Leave Control number (optional) . . . . .	
---	--

**Employee information:** Correct to match employee information on W-2

Employee's SSN. . . . . 788-87-8030				
First name SURESH	M.I. THELU	Last name	Suff.	
Address 550 75TH ST, Apt. 205	City DOWNERS GROVE	St IL	ZIP code 60516	
Foreign Province/County	Foreign Postal Code			
Foreign Country				



# Tax Payments Worksheet

**2020**

▶ Keep for your records

Name(s) Shown on Return SURESH THELU	Social Security Number 788-87-8030
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**Estimated Tax Payments for 2020** (If more than 4 payments for any state or locality, see Tax Help)

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1	07/15/20		07/15/20			07/15/20		
2	07/15/20		07/15/20			07/15/20		
3	09/15/20		09/15/20			09/15/20		
4	01/15/21		01/15/21			01/15/21		
5								
<b>Tot Estimated Payments . . .</b>								

Tax Payments Other Than Withholding (If multiple states, see Tax Help)		Federal	State	ID	Local	ID
6	Overpayments applied to 2020 . . . .					
7	Credited by estates and trusts . . . .					
8	<b>Totals</b> Lines 1 through 7 . . . . .					
9	2020 extensions . . . . .					

Taxes Withheld From:				Federal	State	Local
10	Forms W-2 . . . . .			10,007.	3,518.	
11	Forms W-2G . . . . .					
12	Forms 1099-R . . . . .					
13	Forms 1099-MISC, 1099-NEC, 1099-K, 1099-G . . . . .					
14	Schedules K-1 . . . . .					
15	Forms 1099-INT, DIV and OID . . . . .					
16	Social Security and Railroad Benefits . . . . .					
17	Form 1099-B . . . . .	St	Loc			
18 a	Other withholding . . . . .	St	Loc			
b	Other withholding . . . . .	St	Loc			
c	Other withholding . . . . .	St	Loc			
d	Additional Medicare Tax. . . . .					
19	<b>Total Withholding</b> Lines 10 through 18d . . . . .			10,007.	3,518.	
20	<b>Total Tax Payments for 2020</b> . . . . .			10,007.	3,518.	

Prior Year Taxes Paid In 2020 (If multiple states or localities, see Tax Help)		State	ID	Local	ID
21	Tax paid with 2019 extensions . . . . .				
22	2019 estimated tax paid after 12/31/2019 . . . . .				
23	Balance due paid with 2019 return . . . . .				
24	Other (amended returns, installment payments, etc) . . . . .				

# Earned Income Worksheet

**2020**

▶ Keep for your records

Name(s) Shown on Return SURESH THELU	Social Security Number 788-87-8030
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## Part I – Earned Income Credit Worksheet Computation

	Taxpayer	Spouse	Total
<b>1 If filing Schedule SE:</b>			
<b>a</b> Net self-employment income . . . . .			
<b>b</b> Optional Method and Church Employee income . . . . .			
<b>c</b> Add lines 1a and 1b . . . . .			
<b>d</b> One-half of self-employment tax . . . . .			
<b>e</b> Subtract line 1d from line 1c . . . . .			
<b>2 If not required to file Schedule SE:</b>			
<b>a</b> Net farm profit or (loss) . . . . .			
<b>b</b> Net nonfarm profit or (loss) . . . . .			
<b>c</b> Add lines 2a and 2b . . . . .			
<b>3 If filing Schedule C as a statutory employee,</b> enter the amount from line 1 of that Schedule C . . . . .			
<b>4</b> Add lines 1e, 2c and 3. To EIC Wks, line 5 . . . . .			

## Part II – Form 2441 and Standard Deduction Worksheet Computations

<b>5</b> Net self-employment earnings (line 4 above) . . . . .			
<b>6</b> Wages, salaries, and tips less distributions from nonqualified or section 457 plans, etc . . . . .	71,062.		71,062.
<b>7 a</b> Taxable employer-provided adoption benefits . . . . .			
<b>b</b> Foreign earned income exclusion . . . . .			
<b>8</b> Add lines 5 through 7b. To Form 2441, lines 18 and 19 . . . . .	71,062.		71,062.
<b>9 a</b> Taxable dependent care benefits . . . . .			
<b>b</b> Nontaxable combat pay . . . . .			
<b>10</b> Add lines 8, 9a & 9b. To Form 2441, lines 4 and 5 . . . . .	71,062.		71,062.
<b>11</b> Scholarship or fellowship income not on W-2 . . . . .			
<b>12</b> SE exempt earnings less nontaxable income . . . . .			
<b>13</b> Distributions from nonqualified/Sec. 457 plans . . . . .			
<b>14</b> Add lines 5, 6, 7a, 9a and 11 through 13. To Standard Deduction Worksheet . . . . .	71,062.		71,062.

## Part III – IRA Deduction Worksheet Computation

<b>15</b> Net self-employment income or (loss) . . . . .			
<b>16</b> Wages, salaries, tips, etc . . . . .	71,062.		71,062.
<b>17</b> Net self-employment loss . . . . .			
<b>18</b> Alimony received . . . . .			
<b>19</b> Nontaxable combat pay . . . . .			
<b>20</b> Foreign earned income exclusion . . . . .			
<b>21</b> Keogh, SEP or SIMPLE deduction . . . . .			
<b>22</b> Combine lines 15 through 21. To IRA Wks, In 2. . . . .	71,062.		71,062.

## Part IV – Schedule 8812 and Child Tax Credit Line 14 Worksheet Computations

<b>23</b> Self-employed, church and statutory employees . . . . .			
<b>24</b> Wages, salaries, tips, etc . . . . .	71,062.		71,062.
<b>25</b> Nontaxable combat pay . . . . .			
<b>26</b> Combine lines 23 through 25. To Schedule 8812, line 6a & Line 14 Wks, line 2. . . . .	71,062.		71,062.

Keep for your records

Name(s) shown on return
SURESH THELU

Social Security No.
788-87-8030

General Information:

Property description . . . . . 1-15/A PEMBATLA, SARANGPUR
Property type . . . 3 Vacation/Short-term If type is other, enter a description . . .
Location (street address) . . . . . 1-15/A PEMBATLA, SARANGPUR
City . . . . . JAGTIAL State . . . . . ZIP code . . . . .
If a foreign address: Foreign province or state . . . TELANGANA
Foreign postal code . . . . . 50529 Foreign country . . . . . India

Complete For All Properties:

Did you make any payments that would require you to file Form(s) 1099? . . . . . Yes [ ] No [X]
If yes, did you or will you file all required Form(s) 1099? . . . . . Yes [ ] No [ ]

Complete For All Rental Properties:

Days rented at fair rental value . . . . . 365 Days of personal use . . . . . 0

Check All That Apply:

- A Owned by spouse [ ] B Owned jointly [ ]
C Active participation [X] D Material participation [ ]
E Qualified joint venture [ ] F Some investment is not at risk [ ]
G Other passive exceptions [ ] H Complete taxable disposition — See Help [ ]
I Treat all MACRS assets for this activity as qualified Indian reservation property? . . . Yes [ ] No [X]
J Treat all assets acquired after August 27, 2005 as qualified GO Zone property? . . . Regular [ ] Extension [ ] No [X]
K Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? . . . Yes [ ] No [X]
L Was this activity located in a Qualified Disaster Area? . . . . . Yes [ ] No [X]
M Check this box if filing this Schedule E as an LLC in CA or TX [ ]

Ownership Percentage:

- N Check to allocate income and expenses using ownership percentage [ ]
O Enter ownership percentage . . . . . %

Owner-Occupied Rentals:

- P Check to allocate personal use items to Schedule A [ ]
Q Percentage of rental use . . . . . %

Vacation Home or Property with Personal Use Days:

- R Check to allocate interest and taxes using the Tax Court Method [ ]
S Number of days property owned if less than the entire year . . . . .

Income		% if Different	Total
<b>3 Enter rental income (not reported elsewhere).</b> . . . . .	520.		
Rental income from Form 1099-MISC . . . . .			
Rental income from Form 1099-K . . . . .			
Rental Income from Cancellation of Debt Wks . . . . .			
Total rents received . . . . .	520.	100.000000	520.
<b>4 Enter royalties received (not reported elsewhere)</b> . . . . .			
Royalty income from Form 1099-MISC . . . . .			
Royalty income from Form 1099-K . . . . .			
Royalty Income from Cancellation of Debt Wks . . . . .			
Royalty Income from Schedule K-1 . . . . .			
Total royalties received . . . . .			

Expenses	(a) Total	(b) Enter % if not 100.00	(c) Reported On Schedule E	(d) Vacation Home Loss Limitation	(e) Allocated to Personal use
<b>5 Advertising</b> . . . . .	100.		100.		
<b>6 a Auto</b> . . . . .					
<b>b Travel</b> . . . . .	150.		150.		
<b>7 Cleaning and maint</b> . . . . .	250.		250.		
<b>8 Commissions</b> . . . . .					
<b>9 a Mort insur qualified</b> . . . . .					
From Form 1098 import					
Total mort insur qual . . . . .					
<b>b Other Insurance</b> . . . . .					
<b>10 Legal &amp; other prof fees</b> . . . . .					
<b>11 Management fees</b> . . . . .					
<b>12 a Mortgage int qualified</b> . . . . .					
From Form 1098 import					
Total mort int qualified . . . . .					
<b>b Mort int other</b> . . . . .					
From Form 1098 import					
Total mort int other . . . . .					
<b>13 Other interest</b> . . . . .	5,800.		5,800.		
<b>14 Repairs</b> . . . . .	250.		250.		
<b>15 Supplies</b> . . . . .					
<b>16 a Real estate taxes</b> . . . . .					
From Form 1098 import					
Total real estate taxes . . . . .					
<b>b Other taxes</b> . . . . .					
<b>17 Utilities</b> . . . . .					
<b>18 a Depreciation</b> . . . . .					
<b>b Depletion</b> . . . . .					
<b>c Depreciation carryover</b> . . . . .					
<b>19 Other expenses</b> . . . . .					
<b>a</b> . . . . .					
<b>b</b> . . . . .					
<b>c</b> . . . . .					
<b>d</b> . . . . .					
<b>e Indirect operating exp</b> . . . . .					
<b>f Operating exp carryover</b> . . . . .					
<b>g Vehicle rental</b> . . . . .					
<b>h Amortization</b> . . . . .					
<b>20 Add lines 5 through 19</b> . . . . .	6,550.		6,550.		
<b>21 Income or (loss)</b> . . . . .			-6,030.		
<b>22 Deductible rental real estate loss</b> . . . . .			-6,030.		

# Federal Carryover Worksheet

**2020**

▶ Keep for your records

Name(s) Shown on Return SURESH THELU	Social Security Number 788-87-8030
---	---------------------------------------

**2019 State and Local Income Tax Information**

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With- held/Pmts	(e) Paid With Return	(f) Total Over- payment	(g) Applied Amount
<b>Totals . .</b>						

**2019 State Extension Information**

(a) State	(b) Paid With Extension

**2019 Locality Extension Information**

(a) Locality	(b) Paid With Extension

**2019 State Estimates Information**

(a) State	(c) Estimates Paid After 12/31

**2019 Locality Estimates Information**

(a) Locality	(c) Estimates Paid After 12/31

**2019 State Taxes Due Information**

(a) State	(e) Paid With Return

**2019 Locality Taxes Due Information**

(a) Locality	(e) Paid With Return

**2019 State Refund Applied Information**

(a) State	(g) Applied Amount

**2019 Locality Refund Applied Information**

(a) Locality	(g) Applied Amount

**2019 State Tax Refund Information**

(a) State	(d) Total Withheld/Pmts	(f) Total Overpayment

**2019 Locality Tax Refund Information**

(a) Locality	(d) Total Withheld/Pmts	(f) Total Overpayment

Other Tax and Income Information		2019	2020
1	Filing status . . . . .		1 Single
2	Number of exemptions for blind or over 65 (0 - 4) . . . . .		
3	Itemized deductions . . . . .		3,518.
4	Check box if required to itemize deductions . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
5	Adjusted gross income . . . . .		65,032.
6	Tax liability for Form 2210 or Form 2210-F . . . . .		7,368.
7	Alternative minimum tax . . . . .		
8	Federal overpayment applied to next year estimated tax . . . . .		

QuickZoom to the IRA Information Worksheet for IRA information . . . . . ▶

Excess Contributions		2019	2020
9 a	Taxpayer's excess Archer MSA contributions as of 12/31 . . . . .		
b	Spouse's excess Archer MSA contributions as of 12/31 . . . . .		
10 a	Taxpayer's excess Coverdell ESA contributions as of 12/31 . . . . .		
b	Spouse's excess Coverdell ESA contributions as of 12/31 . . . . .		
11 a	Taxpayer's excess HSA contributions as of 12/31 . . . . .		
b	Spouse's excess HSA contributions as of 12/31 . . . . .		

Loss and Expense Carryovers		2019	2020
Note: Enter all entries as a positive amount			
12 a	Short-term capital loss . . . . .		
b	AMT Short-term capital loss . . . . .		
13 a	Long-term capital loss . . . . .		
b	AMT Long-term capital loss . . . . .		
14 a	Net operating loss available to carry forward . . . . .		
b	AMT Net operating loss available to carry forward . . . . .		
15 a	Investment interest expense disallowed . . . . .		
b	AMT Investment interest expense disallowed . . . . .		
16	Nonrecaptured net Section 1231 losses from:	a	2020 . . . . .
		b	2019 . . . . .
		c	2018 . . . . .
		d	2017 . . . . .
		e	2016 . . . . .
		f	2015 . . . . .
17	AMT Nonrecap'd net Sec 1231 losses from:	a	2020 . . . . .
		b	2019 . . . . .
		c	2018 . . . . .
		d	2017 . . . . .
		e	2016 . . . . .
		f	2015 . . . . .

# Tax Summary Report

**2020**

Name(s) Shown on Return

SURESH THELU

Filing status . . . . . Single

Number of exemptions . . . . . 1

**Gross Income**

Wages and salaries . . . . .	71,062.
Interest and dividend income . . . . .	_____
Business income (loss) . . . . .	_____
Capital gains (losses) . . . . .	_____
Pensions and annuities . . . . .	_____
Rents, royalties, partnerships, etc . . . . .	-6,030.
Farm income (loss) . . . . .	_____
Social security benefits . . . . .	_____
Other income . . . . .	_____
<b>Total Gross Income</b> . . . . .	<b>65,032.</b>

**Adjustments to Income** . . . . .

**Adjusted Gross Income** . . . . . (Last year's AGI) . . . . . 65,032.

**Itemized/Standard Deductions**

Medical and dental . . . . .	_____
Taxes . . . . .	3,518.
Interest . . . . .	_____
Contributions . . . . .	_____
Casualty or theft loss(es) . . . . .	_____
Miscellaneous . . . . .	_____
<b>Total Itemized Deductions</b> . . . . .	<b>3,518.</b>
Standard deduction . . . . .	12,400.

**Taxable Income** . . . . . 52,632.

Income tax . . . . .	7,368.
Alternative minimum tax . . . . .	_____
<b>Total Taxes before Credits</b> . . . . .	<b>7,368.</b>
Nonbusiness credits . . . . .	_____
Business credits . . . . .	_____
<b>Total Credits</b> . . . . .	_____
Self-employment tax . . . . .	_____
Other taxes . . . . .	_____

**Total Tax** . . . . . 7,368.

Withholding . . . . .	10,007.
Estimated tax payments . . . . .	_____
Other payments . . . . .	_____
<b>Total Payments</b> . . . . .	<b>11,807.</b>
Estimated tax penalty . . . . .	_____
Refund applied to next year's estimated tax . . . . .	_____

**Amount Overpaid** . . . . . 4,439.

**Refund** . . . . . 4,439.

**Amount Applied to Estimate** . . . . . \_\_\_\_\_

**Amount Due** . . . . . 0.

Tax bracket . . . . .	22.0 %
Effective tax rate . . . . .	11.33 %

# Recovery Rebate Credit Worksheet

**2020**

Name(s) Shown on Return  
SURESH THELU

Social Security No.  
788-87-8030

**This worksheet is used to compute the allowed recovery rebate credit for line 30 of Form 1040 or 1040-SR after accounting for any economic stimulus payment previously received.**

<p><b>1</b> Can you be claimed as a dependent on another person's 2020 return?  <input checked="" type="checkbox"/> <b>No.</b> Go to line 2  <input type="checkbox"/> <b>Yes. Stop.</b> You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on Form 1040, line 30.</p> <p><b>2</b> Does your 2020 return include a valid social security number for you, and if filing a joint return, your spouse?  <input checked="" type="checkbox"/> <b>Yes.</b> Skip lines 3 and 4 and go to line 5.  <input type="checkbox"/> <b>No.</b> If you are filing a joint return, go to line 3. If you aren't filing a joint return, <b>Stop.</b> You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on line 30.</p> <p><b>3</b> Was at least one of you a member of the U.S. Armed Forces at any time during 2020, and does at least one of you have a valid social security number?  <input type="checkbox"/> <b>Yes.</b> Your credit is not limited. Go to line 5.  <input type="checkbox"/> <b>No.</b> Go to line 4.</p> <p><b>4</b> Does one of you have a valid social security number?  <input type="checkbox"/> <b>Yes.</b> Your credit is limited. Go to line 5.  <input type="checkbox"/> <b>No. Stop.</b> You can't take the credit. Don't complete the rest of this worksheet and don't enter any amount on Form 1040, line 30.</p> <p><b>5</b> Enter: ● \$1,200 if single, head of household, married filing separately, qualifying widow(er), or if married filing jointly and you answered "Yes" to question 4, or          ● \$2,400 if married filing jointly and you answered "Yes" to question 2 or 3. . . . .</p> <p><b>6</b> Multiply \$500 by the number of qualifying children under age 17 at the end of 2020 listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you either checked the "Child tax credit" box or entered an adoption taxpayer identification number . . . . .</p> <p><b>7</b> Add lines 5 and 6 . . . . .</p> <p><b>8</b> Enter: ● \$600 if single, head of household, married filing separately, qualifying widow(er), or if married filing jointly and you answered "Yes" to question 4, or          ● \$1,200 if married filing jointly and you answered "Yes" to question 2 or 3. . . . .</p> <p><b>9</b> Multiply \$600 by the number of qualifying children under age 17 at the end of 2020 listed in the Dependents section on page 1 of Form 1040 or 1040-SR for whom you either checked the "Child tax credit" box or entered an adoption taxpayer identification number . . . . .</p> <p><b>10</b> Add lines 8 and 9 . . . . .</p> <p><b>11</b> Enter the amount from line 11 of Form 1040 or 1040-SR . . . . .</p> <p><b>12</b> Enter the amount shown below for your filing status :          ● \$150,000 if married filing jointly or qualifying widow(er)          ● \$112,500 if head of household          ● \$75,000 if single or married filing separately</p> <p><b>13</b> Is the amount on line 11 more than the amount on line 12?  <input checked="" type="checkbox"/> <b>No.</b> Skip line 14. Enter the amount from line 7 on line 15 and the amount from line 10 on line 18.  <input type="checkbox"/> <b>Yes.</b> Subtract line 12 from line 11. . . . .</p> <p><b>14</b> Multiply line 13 by 5% (0.05) . . . . .</p> <p><b>15</b> Subtract line 14 from line 7. If zero or less, enter -0- . . . . .</p> <p><b>16</b> Enter the amount, if any, of the economic impact payment (EIP) 1 that was issued to you (before offset for any past-due child support payment). You may refer to Notice 1444 or your tax account information at IRS.gov/Account for the amount to enter here. . . . .</p> <p><b>17</b> Subtract line 16 from line 15. If zero or less, enter -0-. If line 16 is more than line 15 you don't have to pay back the difference . . . . .</p> <p><b>18</b> Subtract line 14 from line 10. If zero or less, enter -0- . . . . .</p> <p><b>19</b> Enter the amount, if any, of EIP 2 that was issued to you. You may refer to Notice 1444-B or your tax account information at IRS.gov/Account for the amount to enter here. . . . .</p> <p><b>20</b> Subtract line 19 from line 18. If zero or less, enter -0-. If line 19 is more than line 18 you don't have to pay back the difference . . . . .</p> <p><b>21</b> <b>Recovery rebate credit.</b> Add lines 17 and 20. Enter the result here and, if more than zero, on line 30 of Form 1040 or 1040-SR. . . . .</p>	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px;"><b>5</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">1,200.</td> </tr> <tr> <td><b>6</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td><b>7</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">1,200.</td> </tr> <tr> <td><b>8</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">600.</td> </tr> <tr> <td><b>9</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td><b>10</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">600.</td> </tr> <tr> <td><b>11</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">65,032.</td> </tr> <tr> <td><b>12</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">75,000.</td> </tr> <tr> <td><b>13</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td><b>14</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> </tr> <tr> <td><b>15</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">1,200.</td> </tr> <tr> <td><b>16</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">0.</td> </tr> <tr> <td><b>17</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">1,200.</td> </tr> <tr> <td><b>18</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">600.</td> </tr> <tr> <td><b>19</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">0.</td> </tr> <tr> <td><b>20</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">600.</td> </tr> <tr> <td><b>21</b></td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;">1,800.</td> </tr> </table>	<b>5</b>	1,200.	<b>6</b>		<b>7</b>	1,200.	<b>8</b>	600.	<b>9</b>		<b>10</b>	600.	<b>11</b>	65,032.	<b>12</b>	75,000.	<b>13</b>		<b>14</b>		<b>15</b>	1,200.	<b>16</b>	0.	<b>17</b>	1,200.	<b>18</b>	600.	<b>19</b>	0.	<b>20</b>	600.	<b>21</b>	1,800.
<b>5</b>	1,200.																																		
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<b>20</b>	600.																																		
<b>21</b>	1,800.																																		



### Smart Worksheets from your 2020 Federal Tax Return

SMART WORKSHEET FOR: Federal Information Worksheet  
Print page 2 . . . . .

SMART WORKSHEET FOR: Federal Information Worksheet  
Print page 3 . . . . .

SMART WORKSHEET FOR: Federal Information Worksheet  
Print page 4 . . . . .

SMART WORKSHEET FOR: Federal Information Worksheet  
Print page 5 . . . . .

SMART WORKSHEET FOR: Federal Information Worksheet  
Print page 6 . . . . .

SMART WORKSHEET FOR: Form W-2 Worksheet (COMTEK GLOBAL INC)

<b>Qualified Business Income Deduction Smart Worksheet</b>	
<i>Completing this worksheet is only necessary if Statutory Employee (Box 13) has been checked and expenses will not be deducted on Schedule C (Part I, row B is not checked).</i>	
A	Is this activity a qualified trade or business under Section 199A? . . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No
B	QBI worksheet to report . . . . . <input type="checkbox"/>
C	Specified Service Trade or Business (SSTB)? . . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No

SMART WORKSHEET FOR: Form W-2 Worksheet (BEEJAUM TECHNOLOGY GROUP, INC)

<b>Qualified Business Income Deduction Smart Worksheet</b>	
<i>Completing this worksheet is only necessary if Statutory Employee (Box 13) has been checked and expenses will not be deducted on Schedule C (Part I, row B is not checked).</i>	
A	Is this activity a qualified trade or business under Section 199A? . . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No
B	QBI worksheet to report . . . . . <input type="checkbox"/>
C	Specified Service Trade or Business (SSTB)? . . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No

SMART WORKSHEET FOR: Schedule E Worksheet (1-15/A PEMBATLA, SARANGPUR)

This copy of the Worksheet will be on . [Schedule E, Page 1, Copy 1, Property A](#)

SMART WORKSHEET FOR: Schedule E Worksheet (1-15/A PEMBATLA,SARANGPUR)

Qualified Business Income Deduction Smart Worksheet

Completing this worksheet past line A is generally only necessary if Form 8995A must be filed (i.e. taxable income is above threshold amounts or qualified coop payments are present).

**A 1** Is this activity a qualified trade or business?  Yes  No

**a** This rental qualifies as a business under the safe harbor requirements of Notice 2019-07

**b** This rental is part of a Rental Real Estate Enterprise described in Rev Proc 2019-38   
If part of a Rev Proc 2019-38 enterprise, select group # (see help)

**2** QBI worksheet to report if qualified business (double click to link) . . . . . ▶ \_\_\_\_\_

**B** Trade or Business Name . . . . . \_\_\_\_\_

**C** Trade or Business ID Number . . . . . \_\_\_\_\_

**D 1** Is this a Specified Service Trade or Business (SSTB)?  Yes  No

**2** If No, is income attributable to a SSTB? (see help) . . . .  Yes  No

**3** QBI worksheet for SSTB income (this will auto-populate if Yes) . . . . . \_\_\_\_\_

**4** Percentage of qualified income attributable to SSTB \_\_\_\_\_ %

**E 1** Tentative Schedule E profit (loss) from this business . . . . . \_\_\_\_\_

**2** Adjustments to qualified business income . . . . . \_\_\_\_\_

**3** Schedule E qualified business income . . . . . \_\_\_\_\_

**4 a** Calculated QBI allowed after passive/at-risk limits . . . . . \_\_\_\_\_

**b** Adjustments to allowed QBI . . . . . \_\_\_\_\_

**c** Allowable QBI after loss limits . . . . . \_\_\_\_\_

**5** Additional deductions related to this business reported on separate schedules . . . . . \_\_\_\_\_

**6** Net profit (loss) after adjustments, limitations, and deductions . . . . . \_\_\_\_\_

**7** Allowable Schedule E profit (loss) allocated to SSTB . . . . . \_\_\_\_\_

**8** Allowable Schedule E profit (loss) from this business . . . . . \_\_\_\_\_

**F 1** Ordinary gain (loss) from business assets . . . . . \_\_\_\_\_

**2** Ordinary gain (loss) adjustments . . . . . \_\_\_\_\_

**3** Qualified ordinary gain (loss) . . . . . \_\_\_\_\_

**4 a** Calculated QBI allowed after passive/at-risk limits . . . . . \_\_\_\_\_

**b** Adjustments to allowed QBI . . . . . \_\_\_\_\_

**c** Allowable short term qualified gain (loss) after passive/at-risk limits . . . . . \_\_\_\_\_

**5** Allowable ordinary gain (loss) allocated to SSTB . . . . . \_\_\_\_\_

**6** Allowable ordinary gain (loss)/recapture from this business . . . . . \_\_\_\_\_

**G 1** Section 1231 gain (loss) from business assets . . . . . \_\_\_\_\_

**2** Section 1231 gain (loss) adjustments . . . . . \_\_\_\_\_

**3** Section 1231 gain (loss) from qualified business . . . . . \_\_\_\_\_

**4 a** Calculated QBI allowed after passive/at-risk limits . . . . . \_\_\_\_\_

**b** Adjustments to allowed QBI . . . . . \_\_\_\_\_

**c** Allowable **ordinary** 1231 qualified gain (loss) . . . . . \_\_\_\_\_

**5** Allowable ordinary 1231 gain (loss) allocated to SSTB . . . . . \_\_\_\_\_

**6** Allowable ordinary 1231 gain (loss) from this business . . . . . \_\_\_\_\_

SMART WORKSHEET FOR: Schedule E Worksheet (1-15/A PEMBATLA,SARANGPUR)

<b>Activity Summary Smart Worksheet</b> Supporting information provided by program. NO ENTRIES ARE NEEDED.			
	Regular Tax	QBI	Alternative Minimum Tax
<b>A</b> Ownership . . . . .	Taxpayer		
<b>B</b> At risk status . . . . .	All		
<b>C</b> Passive status . . . . .	Active RE		
<b>Schedule E</b>			
<b>D</b> Tentative profit (loss) . . . . .	-6,030.		-6,030.
<b>E</b> Other adjustments . . . . .			
<b>F</b> At risk disallowed loss . . . . .			
<b>G</b> Passive carryover loss . . . . .			
<b>H</b> Passive disallowed loss . . . . .			
<b>I</b> Net profit (loss) allowed . . . . .	-6,030.		-6,030.
<b>Related Dispositions</b>			
<b>J</b> Tentative profit (loss) . . . . .			
<b>K</b> At risk disallowed loss . . . . .			
<b>L</b> Passive carryover loss . . . . .			
<b>M</b> Passive disallowed loss . . . . .			
<b>N</b> Net profit (loss) allowed . . . . .			

DONOR



Illinois Department of Revenue  
**2020 Form IL-1040**

Individual Income Tax Return or for fiscal year ending \_\_\_/\_\_\_/\_\_\_

Over 80% of taxpayers file electronically. It is easy and you will get your refund faster. Visit [tax.illinois.gov](http://tax.illinois.gov).

**Step 1: Personal Information**

1992

788-87-8030

SURESH

THELU

550 75TH ST

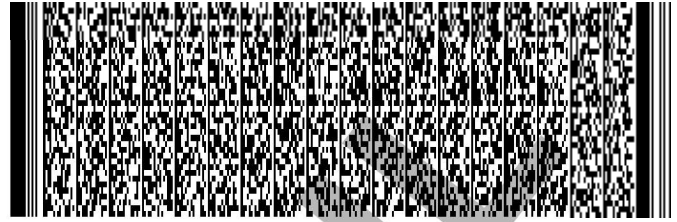
205

DOWNERS GROVE

IL

60516

DUPAGE



- B** Filing status:  Single  Married filing jointly  Married filing separately  Widowed  Head of household  
**C** Check if someone can claim you, or your spouse if filing jointly, as a dependent. See instructions.  You  Spouse  
**D** Check the box if this applies to you during 2020:  Nonresident - Attach Sch. NR  Part-year resident - Attach Sch. NR

**Step 2: Income**

(Whole dollars only)

<b>1</b> Federal adjusted gross income from your federal Form 1040 or 1040-SR, Line 11.	<b>1</b> 65,032.00
<b>2</b> Federally tax-exempt interest and dividend income from your federal Form 1040 or 1040-SR, Line 2a.	<b>2</b> .00
<b>3</b> Other additions. Attach Schedule M.	<b>3</b> .00
<b>4</b> Total income. Add Lines 1 through 3.	<b>4</b> 65,032.00

**Step 3: Base Income**

<b>5</b> Social Security benefits and certain retirement plan income received if included in Line 1. Attach Page 1 of federal return.	<b>5</b> .00
<b>6</b> Illinois Income Tax overpayment included in federal Form 1040 or 1040-SR, Schedule 1, Ln. 1.	<b>6</b> .00
<b>7</b> Other subtractions. Attach Schedule M. Check if Line 7 includes any amount from Schedule 1299-C. <input type="checkbox"/>	<b>7</b> .00
<b>8</b> Add Lines 5, 6, and 7. This is the total of your subtractions.	<b>8</b> .00
<b>9</b> Illinois base income. Subtract Line 8 from Line 4.	<b>9</b> 65,032.00

**Step 4: Exemptions**

<b>10 a</b> Enter the exemption amount for yourself and your spouse. See instructions.	<b>a</b> 2,325.00
<b>b</b> Check if 65 or older: <input type="checkbox"/> You + <input type="checkbox"/> Spouse # of checkboxes X \$1,000 =	<b>b</b> .00
<b>c</b> Check if legally blind: <input type="checkbox"/> You + <input type="checkbox"/> Spouse # of checkboxes X \$1,000 =	<b>c</b> .00
<b>d</b> If you are claiming dependents, enter the amount from Schedule IL-E/EIC, Step 2, Line 1. Attach Schedule IL-E/EIC.	<b>d</b> 0.00
<b>Exemption allowance.</b> Add Lines a through d.	<b>10</b> 2,325.00

**Step 5: Net Income and Tax**

<b>11 Residents: Net income.</b> Subtract Line 10 from Line 9.	
<b>Nonresidents and part-year residents:</b> Enter the Illinois net income from Schedule NR. Attach Schedule NR.	<b>11</b> 62,707.00
<b>12 Residents:</b> Multiply Line 11 by 4.95% (.0495). Cannot be less than zero.	
<b>Nonresidents and part-year residents:</b> Enter the tax from Schedule NR.	<b>12</b> 3,104.00
<b>13</b> Recapture of investment tax credits. Attach Schedule 4255.	<b>13</b> .00
<b>14</b> Income tax. Add Lines 12 and 13. Cannot be less than zero.	<b>14</b> 3,104.00

**Step 6: Tax After Nonrefundable Credits**

<b>15</b> Income tax paid to another state while an Illinois resident. Attach Schedule CR.	<b>15</b> .00
<b>16</b> Property tax and K-12 education expense credit amount from Schedule ICR. Attach Schedule ICR.	<b>16</b> .00
<b>17</b> Credit amount from Schedule 1299-C. Attach Schedule 1299-C.	<b>17</b> .00
<b>18</b> Add Lines 15, 16, and 17. This is the total of your credits. Cannot exceed the tax amount on Line 14.	<b>18</b> 0.00
<b>19</b> Tax after nonrefundable credits. Subtract Line 18 from Line 14.	<b>19</b> 3,104.00

**Step 7: Other Taxes**

<b>20</b> Household employment tax. See instructions.	<b>20</b> .00
<b>21</b> Use tax on internet, mail order, or other out-of-state purchases from UT Worksheet or UT Table in the instructions. Do not leave blank.	<b>21</b> 0.00
<b>22</b> Compassionate Use of Medical Cannabis Program Act and sale of assets by gaming licensee surcharges.	<b>22</b> .00
<b>23</b> Total Tax. Add Lines 19, 20, 21, and 22.	<b>23</b> 3,104.00

IL-1040 2D Front (R-12/20)

This form is authorized as outlined under the Illinois Income Tax Act. Disclosure of this information is required. Failure to provide information could result in a penalty.





24 Total tax from Page 1, Line 23. 24 3,104.00

Step 8: Payments and Refundable Credit

25 Illinois Income Tax withheld. Attach Schedule IL-WIT. 25 3,518.00
26 Estimated payments from Forms IL-1040-ES and IL-505-I, including any overpayment applied from a prior year return. 26 .00
27 Pass-through withholding. Attach Schedule K-1-P or K-1-T. 27 .00
28 Earned Income Credit from Schedule IL-E/EIC, Step 4, Line 8. Attach Schedule IL-E/EIC. 28 .00
29 Total payments and refundable credit. Add Lines 25 through 28. 29 3,518.00

Step 9: Total

30 If Line 29 is greater than Line 24, subtract Line 24 from Line 29. 30 414.00
31 If Line 24 is greater than Line 29, subtract Line 29 from Line 24. 31 .00

Step 10: Underpayment of Estimated Tax Penalty and Donations - Only complete Step 10 for late-payment penalty for underpayment of estimated tax or to make a voluntary charitable donation.

32 Late-payment penalty for underpayment of estimated tax. 32 .00
a Check if at least two-thirds of your federal gross income is from farming.
b Check if you or your spouse are 65 or older and permanently living in a nursing home.
c Check if your income was not received evenly during the year and you annualized your income on Form IL-2210. Attach Form IL-2210.
d Check if you were not required to file an Illinois Individual Income Tax return in the previous tax year.
33 Voluntary charitable donations. Attach Schedule G. 33 .00
34 Total penalty and donations. Add Lines 32 and 33. 34 .00

Step 11: Refund

35 If you have an amount on Line 30 and this amount is greater than Line 34, subtract Line 34 from Line 30. This is your overpayment. 35 414.00
36 Amount from Line 35 you want refunded to you. Check one box on Line 37. See instructions. 36 414.00
37 I choose to receive my refund by
a direct deposit - Complete the information below if you check this box.

Routing number 021200339 [X] Checking or Savings
Account number 381042201120

b Illinois Individual Income Tax refund debit card. I acknowledge I have reviewed the card information found at http://tax.illinois.gov/DebitCard prior to making this election.
c paper check.
38 Amount to be credited forward. Subtract Line 36 from Line 35. See instructions. 38 .00

Step 12: Amount You Owe

39 If you have an amount on Line 31, add Lines 31 and 34. - or -
If you have an amount on Line 30 and this amount is less than Line 34, subtract Line 30 from Line 34. This is the amount you owe. See instructions. 39 .00

Step 13: If this is a joint return, both you and your spouse must sign below.
Under penalties of perjury, I state that I have examined this return and, to the best of my knowledge, it is true, correct, and complete.

Sign Here: Your signature, Date, Spouse's signature, Date, Daytime phone number (951) 237-1034
Paid Preparer Use Only: SYAM PRIYA RAM SAGAR GUPTA TALLAM, SYAM PRIYA RAM SAGAR GUPTA TALLAM, 02/09/2021, Check if self-employed, P02082703, Paid Preparer's PTIN
Firm's name: GLOBAL TAXES LLC, Firm's FEIN: 301017196, Firm's address: 2530 Pebble Creek LnCumming GA 30041, Firm's phone: (678) 965-9522
Third Party Designee: Designee's name, Designee's phone number, Check if the Department may discuss this return with the third party designee shown in this step.

Refer to the 2020 IL-1040 Instructions for the address to mail your return.



Illinois Department of Revenue

# 2020 Schedule IL-WIT Illinois Income Tax Withheld

Attach to your Form IL-1040. If you have more than five withholding forms, complete multiple copies of this schedule.

IL Attachment No. 31

Use the reference for Column A shown in the chart below.

Form Type	Letter Code for Column A	Form Type	Letter Code for Column A
W-2	W	1099-DIV	D
W-2G	WG	1099-INT	I
1099-R	R	1042-S	S
1099-G	G	1099-B	B
1099-MISC	M	1099-K	K
1099-OID	O	1099-NEC	N

## Step 1: Provide your withholding records (include all W-2 and 1099 forms that show Illinois withholding)

SURESH THELU

Your name as shown on Form IL-1040

7 8 8 - 8 7 - 8 0 3 0  
Your Social Security number

Column A Form type	Column B Employer/Payer Identification Number	Column C Federal Wages, Winnings, Gross Distributions, Compensation, etc.	Column D Illinois Wages, Winnings, Gross Distributions, Compensation, etc.	Column E Illinois Income Tax Withheld
1 W	20-3584299 000	\$ 11,314.00	\$ 11,314.00	\$ 560.00
2 W	83-3568950	\$ 59,748.00	\$ 59,748.00	\$ 2,958.00
3		\$ .00	\$ .00	\$ .00
4		\$ .00	\$ .00	\$ .00
5		\$ .00	\$ .00	\$ .00

## Step 2: Provide spouse's withholding records (include all W-2 and 1099 forms that show Illinois withholding)

Your spouse's name as shown on Form IL-1040

Your spouse's Social Security number

Column A Form type	Column B Employer/Payer Identification Number	Column C Federal Wages, Winnings, Gross Distributions, Compensation, etc.	Column D Illinois Wages, Winnings, Gross Distributions, Compensation, etc.	Column E Illinois Income Tax Withheld
6		\$ .00	\$ .00	\$ .00
7		\$ .00	\$ .00	\$ .00
8		\$ .00	\$ .00	\$ .00
9		\$ .00	\$ .00	\$ .00
10		\$ .00	\$ .00	\$ .00

## Step 3: Total Illinois withholding

11 Add the amounts in Column E for Lines 1 through 10 (and the amounts from Column E of any additional copies you attached). This is the total amount of your Illinois income tax withheld.

Enter this amount here and on Form IL-1040, Line 25.

11 \$ 3,518.00

➔ Attach all Schedules IL-WIT to your IL-1040. ➔



Illinois Department of Revenue

Submission ID boxes

2020 IL-8453 Illinois Individual Income Tax Electronic Filing Declaration

(Do not mail Form IL-8453 to the Illinois Department of Revenue unless it is requested for review.)

Step 1: Provide taxpayer information

SURESH THELU 7 8 8 - 8 7 - 8 0 3 0
First name and middle initial Spouse's first name (and last name if different) Last name Social Security number
550 75TH ST 205 Mailing address
DOWNERS GROVE IL 60516 (951) 237-1034
City State ZIP Daytime phone number

Step 2: Complete information from tax return

1 Net income from Form IL-1040, Line 11 62,707.00
2 Tax from Form IL-1040, Line 14 3,104.00
3 Illinois Income Tax withheld from Form IL-1040, Line 25 only (enter "0" if none) 3,518.00
4 Overpayment from Form IL-1040, Line 35 414.00
5 Total amount due from Form IL-1040, Line 39 0.00
6 Filing status: X Single Married filing jointly Married filing separately Widowed Head of household

Step 3: Complete direct deposit of refund or electronic funds withdrawal information (Optional)

To initiate a payment or refund transaction, the information in this Step must be included within the electronic transmission. Illinois does not support international ACH transactions. IDOR will only perform direct transactions (e.g., debit, deposit) with financial institutions located within the United States or those not funded by international funds. Electronic payments will not be accepted and refunds will be via paper check.

7 Routing no. (RN): 0 2 1 2 0 0 3 3 9
8 Account no. (AN): 3 8 1 0 4 2 2 0 1 1 2 0
9 Type of account: X Checking Savings
10 Date the payment is to be electronically withdrawn: / /
11 Electronic funds withdrawal amount: 0.00
12 Name on account:

Step 4: Taxpayer declaration and signature (Sign only after completing Step 2 and, if applicable, Step 3.)

- I consent that my refund may be directly deposited as designated in Step 3 and declare the information on Lines 7 through 9 is correct. If I have filed a joint return, this is an irrevocable appointment of the other spouse as an agent to receive the refund.
I authorize the Illinois Department of Revenue (IDOR) and its designated financial agent to initiate an ACH electronic funds withdrawal as designated in the electronic portion of my 2020 Illinois Individual Income Tax return.
I do not want direct deposit of my refund, or an electronic funds withdrawal (direct debit) of my balance due.

Under penalties of perjury, I declare the information on my electronic Form IL-1040 and the information I provided to my electronic return originator (ERO) are identical. To the best of my knowledge, my return is true, correct, and complete. I consent that my return, this declaration, and accompanying information may be sent to IDOR by my ERO. I authorize IDOR to inform my ERO and/or the transmitter when my return has been accepted or rejected. If rejected, I authorize IDOR to identify the reason(s) so the return may be corrected and retransmitted if possible.

Sign here Your signature Date Spouse's signature (if joint return, both must sign) Date

Step 5: Electronic return originator (ERO) and paid preparer declaration and signature

I declare that I have examined this taxpayer's electronic Form IL-1040, the information on this Form IL-8453, and accompanying information. I have followed all requirements of this program and declare, under penalties of perjury, that to the best of my knowledge the taxpayer's return and accompanying information are true, correct, and complete.

ERO's signature 02/09/2021 Date
GLOBAL TAXES LLC Firm's name or your name if self-employed
2530 Pebble Creek Ln Mailing address
Cumming GA 30041
City State ZIP
Check if paid preparer: X (See instructions.)
P 0 2 0 8 2 7 0 3 Your PTIN
3 0 - 1 0 1 7 1 9 6 Federal employer identification number (FEIN)
(678) 965-9522 Daytime phone number

Step 6: Attach required documents (e.g., W-2 forms, 1099 forms, IL-1310).

Do not mail Form IL-8453 and these documents unless requested for review.



Illinois Information Worksheet

2020

Keep for your own records

Part I - Personal Information

Taxpayer:

First Name . . . . . SURESH
Middle Initial . . . . .
Last Name . . . . . THELU
Suffix . . . . .
Social Security No. . . 788-87-8030
Date of Birth . . . . . 06/10/1992
Age 65 or Over . . . [ ]
Legally Blind . . . . [ ]
Date of Death . . . . .
Daytime phone . . . . (951) 237-1034 \* [X]
Home phone . . . . . (951) 237-1034 \* [ ]

Spouse:

First Name . . . . .
Middle Initial . . . . .
Last Name . . . . .
Suffix . . . . .
Social Security No. . .
Date of Birth . . . . .
Age 65 or Over . . . [ ]
Legally Blind . . . . [ ]
Date of Death . . . . .
Daytime phone . . . . . \* [ ]

\* Check one of these boxes to print the daytime phone number on the Illinois forms.

Street Address . . . . . 550 75TH ST Apartment Number . 205
City . . . . . DOWNERS GROVE State . IL ZIP Code . . . 60516
County (Illinois Only) . . DUPAGE

For foreign address, Illinois Department of Revenue requires the following information:

Foreign City . . . . . Foreign Province or State . . .
Foreign Country . . . . . Foreign Postal Code . . . . .

Part II - Resident Status

[X] Full-Year Resident
[ ] Nonresident
[ ] Part-Year Resident . . . . . lived in Illinois from . . . . . to . . . . .
also lived in . . . . . from . . . . . to . . . . .
QuickZoom here to Form IL-1040 . . . . .

Part III - Filing Status

[X] Single
[ ] Married filing jointly
[ ] Married filing separately
[ ] Widowed
[ ] Head of Household

Part IV - Other Information

Form IL-2210 Information:

[ ] Check if at least two-thirds of total federal gross income came from farming
[ ] Check if 65 or older and permanently living in a nursing home
[ ] Check if you were not required to file an Illinois income tax return in 2019
[X] Check if you do not want to file Illinois Form IL-2210 (see on-line help)
Enter total tax from last year's Form IL-1040, line 14 and 22 (for IL-2210, line 1, column B) . . . .
Enter credits from last year's Form IL-1040, lines 15, 16, 17 and 28 (for IL-2210, line 2) . . . .

First Time Filer:

Yes No



Has client ever filed a tax return in Illinois?

**Part V – Electronic Filing Information**

File **state** return electronically

**Electronic PDF Attachments**

PDF's that you have selected to attach to your state e-file return are listed below.

Description	Filename

Date return was EFiled . . . . . \_\_\_\_\_  
 Date return was accepted by the state . . . . . \_\_\_\_\_  
 Enter the date Form IL-1040-V was given to client . . . . . \_\_\_\_\_  
**QuickZoom** to Form IL-8453: Additional Information Smart Worksheet . . . . .

**Part VI – Direct Deposit Information or Electronic Funds Withdrawal Information**

**Yes No**  
  Use **direct deposit** for **state tax refund**  
  Use **electronic funds withdrawal** for **state tax payment** (EF only)  
  Elect to receive a state issued debit card for state refund (if you check **No** then your client will receive a paper check)

If you selected direct deposit or electronic funds withdrawal, fill out the information below:

Name of Financial Institution (optional) . . . . . BANK OF AMERICA  
 Name on account . . . . . \_\_\_\_\_  
 Check the appropriate box:  
 Checking . . . . .  Routing number . . . . . 021200339  
 Savings . . . . .  Account number . . . . . 381042201120  
 Enter the payment date to withdraw from the account above . . . . . \_\_\_\_\_  
 State balance-due amount from this return . . . . . \_\_\_\_\_  
 Enter an amount to withdraw from the account above . . . . . \_\_\_\_\_  
 If partial payment is made, enter remaining balance due . . . . . \_\_\_\_\_

**International ACH Transactions**

**Yes No**  
  Will the funds for this refund (or payment) go to (or come from) an account outside the U.S.?

**Part VII – Payment by Credit Card**

Check if the balance due will be paid by credit card

**Part VIII – Paid Preparer Information and Third Party Designee Information**

Enter the preparer's assigned code from Preparer's Information Worksheet . . . . . 01

Check if this tax return is . . . . .  self-prepared, or  prepared by a non-paid preparer

**Yes No**  
  Client allows a personal representative to discuss return with the Illinois Department of Revenue  
 If yes, complete information below:

Designee's name . . . . . \_\_\_\_\_  
 Designee's phone number . . . . . \_\_\_\_\_

**Part IX – Extension Status**

**Yes No**  
  Tax return due date extended? If yes, extended due date . . . . . \_\_\_\_\_

**QuickZoom** to Form IL-505-I: Automatic Extension Payment . . . . .

# Tax Payments Worksheet

**2020**

▶ Keep for your records

Name SURESH THELU	Social Security Number 788-87-8030
----------------------	---------------------------------------

## Tax Payments for the Current Year

		State	
		Date	Payment
1	First Payment . . . . .		
2	Second Payment . . . . .		
3	Third Payment . . . . .		
4	Fourth Payment . . . . .		
<b>Additional Payments</b>			
5	Payment . . . . .		
	Payment . . . . .		
	Payment . . . . .		
	Payment . . . . .		
	Payment . . . . .		
6	Overpayment from previous year applied to current year . . . . .	6	
7	Amount paid with current year extension . . . . .	7	
8	<b>Total tax payments</b> . . . . .	8	

## Income Taxes Withheld for the Current Year

9	State withholding on Forms W-2 . . . . .	9	3,518.
10	State withholding on Forms W-2G . . . . .	10	
11	State withholding on Forms 1099-R . . . . .	11	
12 a	State withholding on Forms 1099-MISC . . . . .	12 a	
b	State withholding on Forms 1099-NEC . . . . .	b	
c	State withholding on Forms 1099-G . . . . .	c	
d	State withholding on Forms 1099-K . . . . .	d	
e	State withholding on Forms 1099-INT, 1099-DIV and 1099-OID . . . . .	e	
13	Other state tax withholding . . . . .	13	
14	<b>Total income tax withheld</b> . . . . .	14	3,518.
15	Date return will be filed and balance paid . . . . .	15	

## STATE REQUIRED INFORMATION

### State Required Information

The Illinois Department of Revenue requires the following information be presented to all taxpayers:

**Refund Status:** The Illinois Department of Revenue (IDOR) is required to review returns and ensure the amounts requested as refunds are issued accurately and to the legitimate recipient. Once a return is received by IDOR, many different factors can affect the timing of a refund.

Some returns take longer to review than others for many reasons including, but not limited to,

- when and how the return was filed,
- our current return inventory levels,
- identity theft and fraud security measures,
- the types of income tax credits claimed, and
- the type and amount of a refund.

**Tax Due Expectations:** For payment options visit:

<https://www2.illinois.gov/rev/individuals/pay/Pages/default.aspx>

**Taxpayer Identity and Security:** Driver's license or state identification card information is not required but is preferred to be received with the e-file tax return. It can be used as a security measure to help prevent identity theft and fraud. If no driver's license or state ID card information is available or provided, you should be prompted to indicate this in the software.

# Smart Worksheets from your 2020 Illinois Tax Return

SMART WORKSHEET FOR: Form IL-1040: Illinois Individual Income Tax Return

## Use Tax Smart Worksheet

### Method 1: Use Tax Worksheet

Complete this worksheet to report and pay your use tax on Form IL-1040. If your annual use tax liability is over \$600 (\$1,200 if filing jointly), you must file and pay your use tax with Form ST-44.

Note: Do not include any

- items for which you paid sales tax in another state (but not in another country) of
  - 6.25% or more on Line 1a and
  - 1% or more on Line 2a
- sales tax you paid in another state, on line 4, for items not included in Lines 1a or 2a

**1a** Enter the total cost of general merchandise you purchased to use in Illinois on which you did not pay the required amount of Illinois Use Tax . . . . . **1a** \_\_\_\_\_ 0.

**1b** Multiply Line 1a by 6.25% (.0625). Round the result to whole dollars . . . . . **1b** \_\_\_\_\_ 0.

**2a** Enter the total cost of qualifying food, non-prescription drugs and medical appliances you purchased to use in Illinois on which you did not pay the required amount of Illinois Use Tax . . . . . **2a** \_\_\_\_\_

**2b** Multiply Line 2a by 1% (.01). Round the result to whole dollars . . . . . **2b** \_\_\_\_\_ 0.

**3** Add Lines 1b and 2b. **This is your Use Tax on purchases.** . . . . . **3** \_\_\_\_\_ 0.

**4** Enter the amount of sales tax you paid in another state (not in another country) on the items included on Lines 1a and 2a . . . . . **4** \_\_\_\_\_

**5** Subtract Line 4 from Line 3. If the result is less than zero, enter zero. . . . . **5** \_\_\_\_\_

### Method 2: Use Tax Table

To use the Use Tax Table to calculate Use Tax, check here . . . . .

Use tax amount based on table below. . . . . \_\_\_\_\_

### Method 3: File Separate Form ST-44

If this box is checked, your use tax exceeds \$600 (\$1,200 if filing jointly). . . . .

You must file Form ST-44 separately from this return. Use Tax of \$0 will be reported on IL-1040, line 21. If the box is not checked, enter the amount from Method 1 or Method 2 on line 21 below.

### Use Tax Table (Method 2)

If there are no major purchases and do not have receipts to figure purchases, use the table to estimate annual Illinois Use Tax liability.

AGI (from IL-1040, Line 1)	Use Tax
\$0 - \$10,000	\$3
\$10,001 - \$20,000	\$8
\$20,001 - \$30,000	\$13
\$30,001 - \$40,000	\$18
\$40,001 - \$50,000	\$23
\$50,001 - \$75,000	\$31
\$75,001 - \$100,000	\$44
Above \$100,000	Multiply AGI by 0.05% (0.0005)

Keep a copy of this smart worksheet with your records.